

MEMBER SERVICE REPRESENTATIVE

Non-Exempt Position Competency Calculation for Tiers	Estimated Annual Compensation	Hourly Wage
Entry Wage	\$21,222.00	\$10.20
Tier 1	\$21,528.00	\$10.35
Tier 2	\$21,528.00	\$10.78
Tier 3	\$23,316.80	\$11.21
Tier 4	\$24,211.20	\$11.64
Tier 5	\$25,105.60	\$12.07
Tier 6	\$25,992.00	\$12.50

Ability To

Effectively: Performed timely and accurately, meeting expectations consistently

Proficiently: Resolves issues with little or no supervision; skills are performed in an exceptional manner consistently

Proactively: Effectively seeks and provides solutions before needs arise

Tier 1 (Must complete within the Training Period)

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| <input type="checkbox"/> #1 Effectively account for all cash (incoming and outgoing) in assigned money drawer |
| <input type="checkbox"/> #2 Effectively act on member requests or refer appropriately |
| <input type="checkbox"/> #3 Effectively communicate with staff and members |
| <input type="checkbox"/> #4 Effectively perform beginning and end of day procedures, including balancing |
| <input type="checkbox"/> #5 Effectively perform telephone transfers and miscellaneous account inquiries |
| <input type="checkbox"/> #6 Effectively process check holds according to check cashing policy |
| <input type="checkbox"/> #7 Effectively process member transactions |
| <input type="checkbox"/> #8 Effectively provide members with account information |
| <input type="checkbox"/> #9 Effectively serve as a drive up teller (when applicable) |
| <input type="checkbox"/> #10 Effectively support "sales and service" culture |
| <input type="checkbox"/> #11 Effectively utilize departmental hardware and software |
| <input type="checkbox"/> #12 Effectively utilize email, phone and voicemail |
| <input type="checkbox"/> #13 Professionally greet, answer and service member requests |

Tier 2

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| <input type="checkbox"/> #14 Effectively adhere to departmental policies and procedures |
| <input type="checkbox"/> #15 Effectively assist in verifying and reporting daily branch cash letter |
| <input type="checkbox"/> #16 Effectively close primary and secondary share accounts |
| <input type="checkbox"/> #17 Effectively cross sell products and services |
| <input type="checkbox"/> #18 Effectively identify and refer members with past due accounts |
| <input type="checkbox"/> #19 Effectively identify and report to supervisor activities that would trigger SARs |
| <input type="checkbox"/> #20 Effectively identify need and complete report for CTR |
| <input type="checkbox"/> #21 Effectively process foreign negotiable instruments |
| <input type="checkbox"/> #22 Effectively provide consumer loan payoff information |
| <input type="checkbox"/> #23 Effectively provide members with product information |
| <input type="checkbox"/> #24 Proficiently utilize email, voicemail and phone systems |

Tier 3

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| <input type="checkbox"/> #25 Effectively assist in ATM deposit processing |
| <input type="checkbox"/> #26 Effectively assist in Member Service Representative training |
| <input type="checkbox"/> #27 Effectively assist in balancing vault and other vault processes |

<input type="checkbox"/> #28 Effectively assist members in resolving payroll deduction and distribution issues
<input type="checkbox"/> #29 Effectively identify and assist members in resolving past due accounts or refer accordingly
<input type="checkbox"/> #30 Effectively identify member needs and cross sell products and services
<input type="checkbox"/> #31 Proficiently act on member requests or refer appropriately
<input type="checkbox"/> #32 Proficiently communicate with staff and members
<input type="checkbox"/> #33 Proficiently process check holds according to check cashing policy
<input type="checkbox"/> #34 Proficiently provide members with account information
<input type="checkbox"/> #35 Proficiently support "sales and service" culture
<input type="checkbox"/> #36 Proficiently utilize departmental hardware and software
<input type="checkbox"/> #37 Proficiently utilize email, phone and voicemail

Tier 4

<input type="checkbox"/> #38 Effectively assist in balancing ATM cash (when applicable)
<input type="checkbox"/> #39 Effectively assist members in the use of our electronic delivery services
<input type="checkbox"/> #40 Effectively assist members with lost or stolen credit union checks
<input type="checkbox"/> #41 Effectively assist members with stop payments
<input type="checkbox"/> #42 Effectively process ATM deposits
<input type="checkbox"/> #43 Effectively research and resolve member account issues
<input type="checkbox"/> #44 Proficiently identify and assist members in resolving past due accounts or refer accordingly
<input type="checkbox"/> #45 Proficiently process foreign negotiable instruments
<input type="checkbox"/> #46 Proficiently provide members with product information

Tier 5

<input type="checkbox"/> #47 Effectively assist other Member Service Representatives with balancing
<input type="checkbox"/> #48 Effectively balance ATM cash (when applicable)
<input type="checkbox"/> #49 Effectively balance vault and assist with other vault processes
<input type="checkbox"/> #50 Proactively communicate with staff and members
<input type="checkbox"/> #51 Proactively provide members with product information
<input type="checkbox"/> #52 Proactively support "sales and service" culture
<input type="checkbox"/> #53 Proficiently assist members with automatic transfers, payroll and direct deposit issues
<input type="checkbox"/> #54 Proficiently identify member needs and cross sell products and services
<input type="checkbox"/> #55 Proficiently process ATM deposits
<input type="checkbox"/> #56 Proficiently research and resolve member account issues

Tier 6

<input type="checkbox"/> #57 Effectively assist in Member Service Representative staff scheduling
<input type="checkbox"/> #58 Effectively assist in coaching and mentoring Member Service Representative staff
<input type="checkbox"/> #59 Effectively assist in managing ATMs (when applicable)
<input type="checkbox"/> #60 Effectively provide backup to the Member Service Representative - Team Leader
<input type="checkbox"/> #61 Proactively identify member needs and cross sell products and services
<input type="checkbox"/> #62 Proficiently assist in Member Service Representative training
<input type="checkbox"/> #63 Proficiently assist members in resolving payroll deduction and distribution issues
<input type="checkbox"/> #64 Proficiently balance vault and assist with other vault processes

Maintains

Basic Knowledge: Displays fundamental knowledge or understanding. A Supervisor/Manager usually closely directs staff members with Basic Knowledge of a skill.

Working Knowledge: Displays a high degree of accuracy with minimal supervision. May require higher level review upon completion or can verbalize general knowledge of policy, procedure, or skill set.

Thorough Knowledge: Able to perform proficiently with no supervision.

Tier 1

<input type="checkbox"/> #65 A high level of commitment to the organization
<input type="checkbox"/> #66 Absolute confidentiality of credit union, staff and member information
<input type="checkbox"/> #67 An overall score of 3 or greater on the Tier Advancement Review Form
<input type="checkbox"/> #68 Basic knowledge of credit union products and services
<input type="checkbox"/> #69 Basic knowledge of tellering functions
<input type="checkbox"/> #70 Basic knowledge of the responsibilities of the departments within the credit union
<input type="checkbox"/> #71 Effective cash handling skills
<input type="checkbox"/> #72 Effective communication skills
<input type="checkbox"/> #73 Effective member service skills
<input type="checkbox"/> #74 Working knowledge of credit union security procedures
<input type="checkbox"/> #75 Working knowledge of departmental procedures
<input type="checkbox"/> #76 Working knowledge of departmental security procedures

Tier 2

<input type="checkbox"/> #77 An average overall score of 3.25 or greater on the Tier Advancement Review; with all individual sections 3.00 or higher
<input type="checkbox"/> #78 Basic knowledge of ACH, ATM, VISA and check clearing processes
<input type="checkbox"/> #79 Basic knowledge of NCUA Share Insurance and account insurability
<input type="checkbox"/> #80 Basic knowledge of automatic transfers, payroll and direct deposit processes
<input type="checkbox"/> #81 Proficient cash handling skills
<input type="checkbox"/> #82 Working knowledge of credit union products and services
<input type="checkbox"/> #83 Working knowledge of electronic services (Home Banking, Audio Response, etc.)
<input type="checkbox"/> #84 Working knowledge of the policies and procedures within area of responsibility
<input type="checkbox"/> #85 Working knowledge of the responsibilities of the departments within the credit union

Tier 3

<input type="checkbox"/> #86 An average overall score of 3.50 or greater on the Tier Advancement Review; with all individual components of 3.00 or higher
<input type="checkbox"/> #87 Excellent communication skills
<input type="checkbox"/> #88 Excellent member service skills
<input type="checkbox"/> #89 Thorough knowledge of departmental security procedures
<input type="checkbox"/> #90 Working knowledge of ACH, ATM, VISA and Check clearing processes
<input type="checkbox"/> #91 Working knowledge of NCUA Share Insurance and account insurability
<input type="checkbox"/> #92 Working knowledge of automatic transfers, payroll and direct deposit processes

Tier 4

<input type="checkbox"/> #93 An average overall score of 3.75 or greater on the Tier Advancement Review; with all individual components of 3.00 or higher

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| <input type="checkbox"/> #94 Thorough knowledge automatic transfers, payroll and direct deposit processes |
| <input type="checkbox"/> #95 Thorough knowledge of ACH, ATM, VISA and Check clearing processes |
| <input type="checkbox"/> #96 Thorough knowledge of credit union products and services |
| <input type="checkbox"/> #97 Thorough knowledge of electronic services (Home Banking, Audio Response, etc.) |

Tier 5

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| <input type="checkbox"/> #98 An average overall score of 4.00 or greater on the Tier Advancement Review; with all individual components of 3.00 or higher |
| <input type="checkbox"/> #99 Thorough knowledge of the policies and procedures within area of responsibility |

Tier 6

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| <input type="checkbox"/> #100 An average overall score of 4.25 or greater on the Tier Advancement Review; with all individual components of 3.00 or higher |
| <input type="checkbox"/> #101 Thorough knowledge of NCUA Share Insurance and account insurability |
| <input type="checkbox"/> #102 Thorough knowledge of the responsibilities of the departments within the credit union |

Sample Only

Completes

Tier 1

<input type="checkbox"/> #103 CUES: Compliance Training: Safeguarding Customer Information
<input type="checkbox"/> #104 CUES: Credit Unions: An Introduction
<input type="checkbox"/> #105 CUES: Negotiable Instruments and Endorsement
<input type="checkbox"/> #106 CUES: Office Security: Robbery; ATM Safety; and Bomb Threats
<input type="checkbox"/> #107 CUES: Overview of Credit Unions: Organization, Structure, and History
<input type="checkbox"/> #108 CUES: Professional Business Dress
<input type="checkbox"/> #109 CUES: Quality Member Service: Face to Face and on the Phone
<input type="checkbox"/> #110 CUES: Teller Training - Credit Unions
<input type="checkbox"/> #111 PEAK Section 01: Our Credit Union
<input type="checkbox"/> #112 PEAK Section 03: Account Designations
<input type="checkbox"/> #113 PEAK Section 04: Deposit Products
<input type="checkbox"/> #114 PEAK Section 11: Miscellaneous Services

Tier 2

<input type="checkbox"/> #115 CUES: A Primer on Sexual Harassment in the Workplace for Employees
<input type="checkbox"/> #116 CUES: Beginning Financial Math
<input type="checkbox"/> #117 CUES: Business Writing Skills
<input type="checkbox"/> #118 CUES: Check Clearing and Electronic Payment Systems
<input type="checkbox"/> #119 CUES: Compliance Training: Deposit Operations (BSA: Regs: CC, DD, E, D, Q)
<input type="checkbox"/> #120 CUES: Compliance Training: Truth in Savings (NCUA Part 707)
<input type="checkbox"/> #121 CUES: Cross-selling Credit Union Products
<input type="checkbox"/> #122 CUES: Handling Consumer Complaints
<input type="checkbox"/> #123 CUES: Share Account Types and NCUSIF Insurance of Accounts
<input type="checkbox"/> #124 CUES: Violence in the Workplace
<input type="checkbox"/> #125 PEAK Section 05: Checking Products
<input type="checkbox"/> #126 PEAK Section 10: Electronic Services

Tier 3

<input type="checkbox"/> #127 CUES: Compliance Training: Bank Secrecy Act
<input type="checkbox"/> #128 CUES: Compliance Training: Electronic Funds Transfer Act (Reg. E)
<input type="checkbox"/> #129 CUES: Compliance Training: Expedited Funds Availability (Reg. CC)
<input type="checkbox"/> #130 CUES: Compliance Training: Expedited Funds Availability: Check 21
<input type="checkbox"/> #131 CUES: Conflict Resolution
<input type="checkbox"/> #132 CUES: Home Banking and Bill Paying
<input type="checkbox"/> #133 CUES: Improving Negotiation Skills
<input type="checkbox"/> #134 CUES: Oral Communication Skills
<input type="checkbox"/> #135 PEAK Section 02: Regulatory Information
<input type="checkbox"/> #136 PEAK Section 09: Insurance Products

Tier 4

<input type="checkbox"/> #137 CUES: Compliance Training: Check Fraud
<input type="checkbox"/> #138 CUES: Compliance Training: Check Kiting
<input type="checkbox"/> #139 CUES: Compliance Training: Identity Theft

<input type="checkbox"/> #140 CUES: Compliance Training: Office of Foreign Assets Control
<input type="checkbox"/> #141 CUES: Compliance Training: Privacy of Consumer Financial Information (Reg: P)
<input type="checkbox"/> #142 CUES: Compliance Training: The Rights to Financial Privacy Act
<input type="checkbox"/> #143 CUES: Money Laundering
<input type="checkbox"/> #144 CUES: Stress Management
<input type="checkbox"/> #145 OTHER: "Selected" educational requirements based on the credit union's and individual employee's needs; (example: certifications, designations or seminars); approx time 4 hours

Tier 5

<input type="checkbox"/> #146 CUES: Handling Sales Objections
<input type="checkbox"/> #147 CUES: Personal Computer and Internet Security
<input type="checkbox"/> #148 CUES: Time Management
<input type="checkbox"/> #149 OTHER: "Selected" educational requirements based on the credit union's and individual employee's needs; (example: certifications, designations or seminars); approx time 4 hours
<input type="checkbox"/> #150 OTHER: "Selected" educational requirements based on the credit union's and individual employee's needs; (example: certifications, designations or seminars); approx time 4 hours
<input type="checkbox"/> #151 PEAK Section 06: IRAs
<input type="checkbox"/> #152 PEAK Section 07: Consumer Loans

Tier 6

<input type="checkbox"/> #153 CUES: Basic Financial Statements
<input type="checkbox"/> #154 CUES: Leadership Skills
<input type="checkbox"/> #155 CUES: New Account Representative Training
<input type="checkbox"/> #156 OTHER: "Selected" educational requirements based on the credit union's and individual employee's needs; (example: certifications, designations or seminars); approx time 10 hours
<input type="checkbox"/> #157 OTHER: "Selected" educational requirements based on the credit union's and individual employee's needs; (example: certifications, designations or seminars); approx time 4 hours
<input type="checkbox"/> #158 PEAK Section 08: Real Estate Lending